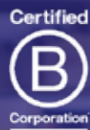


The answer is libraries: The value of public libraries in South Australia

March 2020

Prepared for Public Libraries South Australia

An independent report by SGS Economics and Planning
prepared for Public Libraries South Australia





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Foreword

The South Australian Public Library Network has a long and proud history of providing quality library services across the state, and is recognised internationally as an example of large scale cooperation for the broad and equitable benefit of our communities. Our One Card system is the envy of our interstate counterparts, and has allowed us to collaborate and innovate on a scale that no one service or Council could hope to achieve individually.

For those in the community who regularly utilise the public libraries in South Australia the benefits are real and tangible. From traditional access to print and audio-visual material; to attendance at children's programs; or to get assistance with digital devices, government paperwork, and resume writing; South Australian Libraries are there for people whenever they need them most.

The Answer is Libraries: The Economic value of Public Libraries in South Australia is a report of significant importance as it takes these benefits and quantifies them in a way that allows for an in depth analysis into the value of public libraries and highlights the need for continued support of South Australian public libraries by all levels of government.

Thanks must go to the past and current Public Libraries SA Committees for volunteering their time to help facilitate this report. Special thanks must also go to previous President Lyn Spurling and Treasurer Janice Nitschke for commissioning the report and establishing the initial scope. A big thank you too to the staff at Public Library Services for their support in the provision of data that helped inform the analysis contained within this report.

There has never been more competition for the public dollar at all levels of government, and this report displays just why public libraries are a proven and successful way of converting investment into real benefits for communities. The public library brand is strong and universally loved, and the services that they provide are well known and genuinely improve the lives of those individuals in the community who access them.

In an environment where supporting our communities has never been more important, public libraries are the answer.

A handwritten signature in black ink, appearing to read 'Ben Footner', with a long horizontal flourish extending to the right.

Ben Footner
President, Public Libraries of South Australia

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Executive summary

South Australian public libraries

Public libraries in South Australia provide vital services to their local communities. They welcome over 9.7 million visitors each year; equivalent to 6 visits for each and every South Australian resident.

In addition to the library 'branch' visits, use of and visitation to online library services is increasing with over 20 million visits recorded last year.

Libraries are providing a greater range of services and facilities to visitors in response to the changing nature of library use and community needs. The demand on staff to provide a diversity of support services to visitors is also changing.

South Australian libraries are outperforming the national average on several key metrics. This includes a higher rate of physical and website visits per capita and greater loans per capita (physical and eBooks).

In 2018-19 over 84% of South Australia's public library operational funding was sourced from local government. State government and the Libraries Board (PLS) contribute some recurrent funding (approximately 12%), but very little is received from other sources including the Commonwealth government. Capital funding is also predominantly sourced from local government.

Benefits of public libraries

The value derived from public libraries, on the other hand, has been consistently strong. The value that public libraries generate encompasses the direct and indirect benefits derived by users, as well as the benefits derived by the wider community, including non-users of libraries.

Direct benefits to library users include:

- Access to library materials, collections, services and programs (physical and digital)
- Access to library equipment and spaces, including meeting rooms
- Access to technology, including computers with internet access and online services
- Improved language and digital literacy gained at the library, and
- Social interaction gained at a library.

The indirect benefits of using library services include amongst others:

- Improved community health and career development outcomes
- Complementary support for the services of education institutions
- Efficient and equitable sharing of resources through the OneCard system
- Enhanced local neighbourhood amenity, and
- Environmental sustainability through multiple borrowings of print material.

I love our local library!
Its value is immense!

- South Australian resident

South Australia is outperforming the national average on several metrics including loans and visits per capita.



Non-users also place a value on public library services, even though they do not experience the user benefits described above. This value stems from the non-user's option to use the public library in future and knowing that public libraries are available for other members of the community.

Public libraries also support economic activity in their local economies, through library operating expenditure and spending of library users. These flow on effects are detailed on the following page.

Costs of public libraries

To generate these benefits requires the investment of resources. Total expenditure by public libraries across South Australia totalled \$100.2 million in 2018-19. The majority of this expenditure was on employee costs, at \$58 million (58% of total expenditure). Public libraries also spent a large amount on operating and corporate expenses (\$21 million) and library materials (\$8.0 million)¹.

Net benefits of public libraries

The net value of public libraries is assessed using cost benefit analysis (CBA). CBA is the preferred tool of Australian governments for assessing whether service provision is worthwhile, after accounting for economic, social and environmental considerations.

Public libraries in South Australia generated \$252 million of benefits in 2018-19. After accounting for operational costs, the net community welfare contribution is estimated at \$163 million. This equates to \$95 per capita per year in net community benefits. It also means that for every dollar invested in public libraries, \$2.80 of benefits are generated for the South Australian community.

For every dollar invested in public libraries in South Australia, \$2.80 of benefits are generated for local community members.

¹SA Public Library Services Annual Statistics 2018-19

Local economic activity supported by public libraries

Public libraries also support economic activity in their local economies. This is through the local operating expenditures of libraries combined with the local spending of library users that can be directly attributable to their library usage.

The direct economic impact (stimulus) generated by public libraries in South Australia was \$162 million per year (2017-18).

- \$89 million was generated by public library operational expenditure (55% of total stimulus).
- \$54 million was generated by library user triggered expenditure, resulting from visiting the library (33%), such as buying an iPad after attending a class at the library.
- \$19.5 million was generated by library user retail spending during their visit to the library (12%), such as buying a coffee or lunch.

After accounting for the indirect and induced local economic activities generated by these direct impacts, total economic activity generated by public libraries equated to \$114.5 million in Gross Regional Product per year. Almost 64% of this economic activity occurs in Greater Adelaide (\$73.6 million per year).

Public libraries currently employ over 680 full time equivalent staff; this is the direct employment impact across the state. The additional spending and economic activity resulting from public libraries supports a further 95 jobs in the South Australian economy.

Government funding is essential for public libraries

In 2018-19 over 84% of public library funding was sourced from local government. Funding for libraries is increasingly facing pressure from competing local government service needs.

State government and the Libraries Board contribute some recurrent funding (approximately 12%). Very little is received from other sources including the Commonwealth government.

For the significant community benefits and local economic impacts of public libraries to continue, government funding is vital. The benefits generated for library users and non-users significantly outweigh the operational costs of public libraries; meaning funding for public libraries is an efficient allocation of resources. Public libraries also provide services for disadvantaged and often marginalised community members; contributing to social equity objectives.

Operational funding for public libraries should continue, and arguably, increase significantly given the strength and surety of the community benefits generated.

South Australian public libraries support \$114.5 million of economic activity each year (Gross Regional Product) and underpin the full time employment of 775 South Australians.

Introduction





1.1 Project context

Public Libraries SA (PLSA) commissioned this report to provide an independent analysis of the benefits of public libraries in South Australia, to inform the advocacy agenda in relation to funding, recognising the ongoing financial pressures being placed on public library operations.

SGS Economics & Planning (SGS) has completed similar work in Victoria and Queensland, and Public Libraries SA wished to replicate this work in South Australia so that the value of public libraries can be clearly and confidently advocated.

1.2 Project objectives

The objectives of this project were to estimate the welfare contributions of South Australian public libraries by independently:

- Estimating the costs, benefits and net benefits (or community welfare gains) generated by South Australian public libraries, and
- Assessing the economic value added and employment generated by public library services in local economies across South Australia.

1.3 Report structure

This report is structured as follows:

- Chapter 2 profiles elements of public library service delivery across South Australia
- Chapter 3 outlines the library user survey conducted to inform the estimates generated
- Chapter 4 presents the cost benefit analysis (CBA) of public library services, and
- Chapter 5 presents the economic impact assessment (EIA) of public library services.

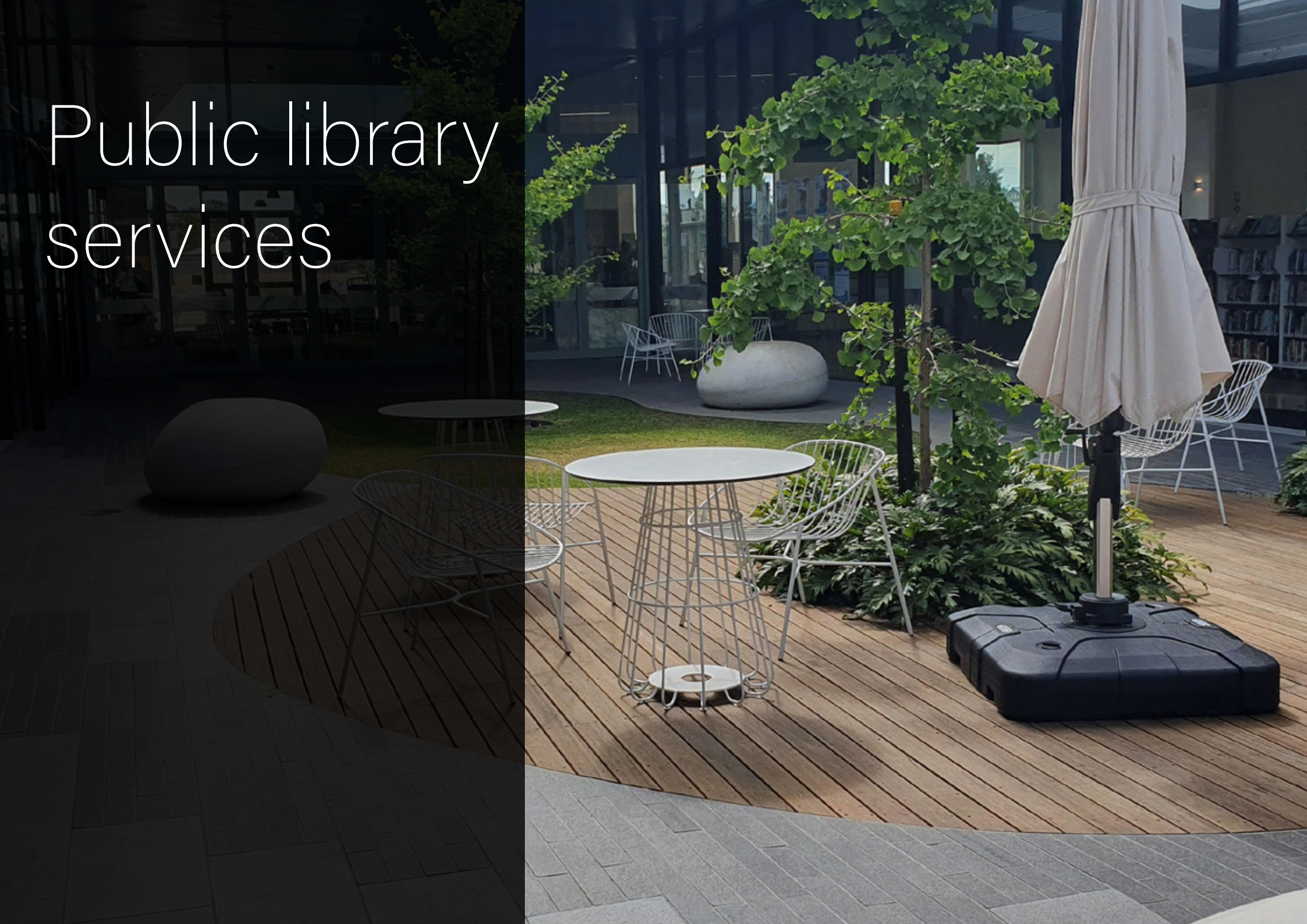
The appendices include more detail on the methodologies employed and results.

Libraries are a fundamental cornerstone to any prosperous, healthy and successful community.

From making us as a new family feel less isolated in Adelaide, to providing shelter and fun on days of extreme weather, to being educationally so important for all children and adults.

- South Australian resident

Public library services



This section examines historical trends in public library services in South Australia. It shows that library usage patterns have evolved, with more digital visits, and that funding has not kept pace with population growth; increasingly burdening local government.

2.1 Visitation to public libraries

Public libraries in South Australia (SA) welcome over 9.7 million visitors each year; equivalent to almost 6 visits per South Australian resident. In addition to the library ‘branch’ visits, use of and visitation to online library services is increasing, with over 20 million visits recorded last year.

Table 1 compares total and per capita rates in 2017/18² for:

- Public library visitation and membership in SA,
- Public library digital (website) visitors,
- Loans of physical items and eBooks, and
- Total resident population in SA.

South Australian libraries received 5.7 visits per capita, higher than the national average of 4.5 visits per capita (most recent comparator). Digital visitation to public library websites in South Australia has grown, with over 3.8 million digital visitors in 2017/18 and over 20 million in 2018/19.

South Australia also had a higher per capita rate of website visitors, eBook loans and physical item loans than the national average (most recent comparator). This indicates that libraries play a valuable role in the local community, and library usage patterns are starting to change as digital visitation increases.

I love my local library! They provide so much for our community.

- South Australian resident

TABLE 1: PUBLIC LIBRARY VISITATION, MEMBERSHIP AND POPULATION

	South Australia 2017/18		Australia 2017/18	
	Total	Per Capita	Total	Per Capita
Library visitors	9,855,642	5.7	111,480,357	4.5
Library members	551,424	0.3	9,002,081	0.4
Website visitors	3,849,466	2.2	51,018,201	2.0
eBook loans	580,459	0.3	5,057,406	0.2
Physical item loans	13,318,472	7.7	141,201,854	5.6
SA Population	1,736,422		24,992,860	

Source: SA Public Library Services Annual Statistics 2017/18

²2017/18 was the latest available year for Australian comparative data

2.2 Types of public libraries

Public libraries in SA are split into three broad categories; Metropolitan, Country and School Community Libraries. Figure 2 presents total visitors to each type of library and visitors per capita in 2018-19.

Metropolitan libraries received 6.6 million visitors in 2018-19, equivalent to 68% of the state’s overall public library visitation, and 5 visits per capita. These libraries are located in metropolitan areas in Greater Adelaide.

Country libraries received 1.9 million visitors in 2018-19, equivalent to 19% of the state’s visitation, and 6 visits per capita. These libraries are located in regional areas of South Australia.

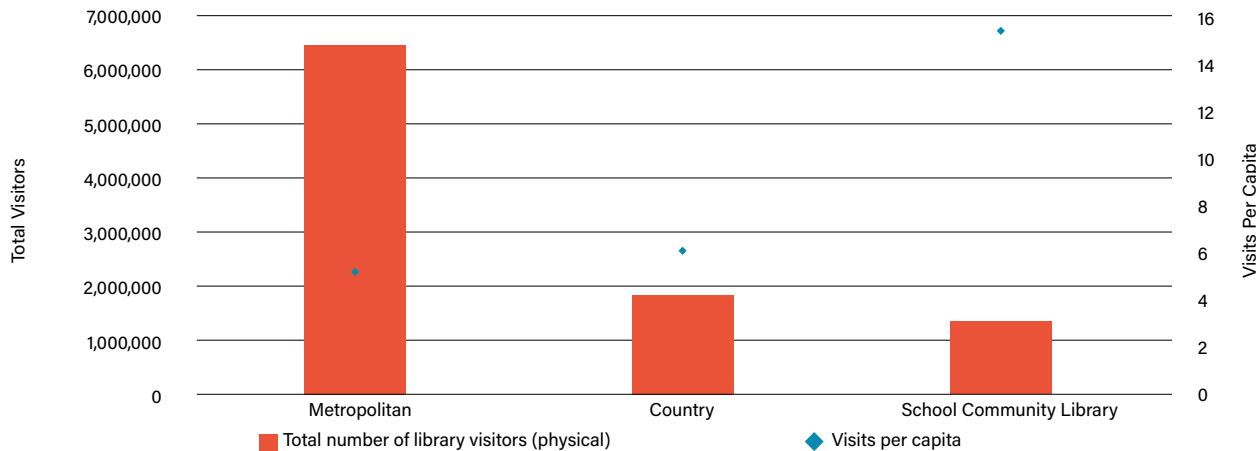
School community libraries are located in remote parts of South Australia, and are joint use libraries operated in conjunction with the Department for Education and Child Development (DECD). In 2018-19 these libraries received 1.3 million visitors, equivalent to 13% of the state’s overall visitation to public libraries. This group of libraries received 15 visits per capita, due to the small population living in these remote areas, and school students also using these libraries.

Membership of libraries across South Australia also varies across the three categories of libraries, as do the number of library branches and employees. Table 1 highlights the differences. Metropolitan libraries employed 490 FTE staff members across 52 library branches, compared with Country libraries which employed 135 FTE staff members across 38 library branches, while School Community Libraries employed 62 FTE staff members across 33 branches.

The library provides a fabulous community hub where you can access a wide variety of programs, events and resources.

- South Australian resident

FIGURE 2: PUBLIC LIBRARY VISITORS AND VISITS PER CAPITA BY LIBRARY TYPE, 2017-18



Source: SA Public Library Services Annual Statistics 2017/18

TABLE 2: MEMBERS, BRANCHES AND EMPLOYEES BY LIBRARY TYPE, 2018-19

	Metropolitan Libraries	Country Libraries	School Community Libraries
Total members	403,073	106,702	29,203
Number of full-time equivalent employees	490	135	62
Number of library branches	52	38	33

Source: SA Public Library Services Annual Statistics 2017/18



2.3 Usage of public libraries

How people use public libraries has changed over the last 15 years. The use of internet devices and attendance at library programs has increased, whilst library membership and visitation have declined. Libraries are providing a greater range of services and facilities to visitors in response to the changing nature of library use.

The number of public access internet devices provided by public libraries in SA has increased by over 600 devices since 2014-15, equivalent to an annual average growth rate of 16.9% per annum. In 2017-18 there were 10.0 devices per 10,000 people in SA, which compares well to the most recent comparator Australia wide (5.6).

Attendance at library programs including adult, children and one on one sessions has increased by over 75,000 attendees since 2014-15 (5.2% annual average growth rate). This is equivalent to 0.31 program attendees per capita in SA, which compares well to the most recent comparator Australia wide (0.28).

Program participation is increasing for accredited outcome-based learning, programs that support other government agencies (e.g. ESL, Tax Help), recreation (place making and liveable cities), and other learning programs in health and finance topics.

TABLE 3: LIBRARY USAGE – INTERNET DEVICES AND PROGRAM ATTENDANCE PER CAPITA

	Public access internet devices provided per 10,000 persons		Program attendance per capita	
	South Australia	Australia	South Australia	Australia
2014-15	6.3	5.5	0.27	0.24
2015-16	6.6	5.3	0.27	0.25
2016-17	7.6	5.6	0.27	0.27
2017-18	10.0	5.6	0.31	0.28
AAGR 2014-15 to 2017-18	16.7%	0.4%	4.7%	5.3%

Source: Australian Public Libraries Statistical Report, NSLA and SA Public Library Services Annual Statistics 2017/18

I use a study space. This has been invaluable as I'm not able to get a quiet space at home.

- South Australian resident

2.4 Expenditure on public libraries

Total expenditure on public libraries in South Australia totalled \$100.2 million in 2018-19. Most of this expenditure was on recurrent operating costs, which included:

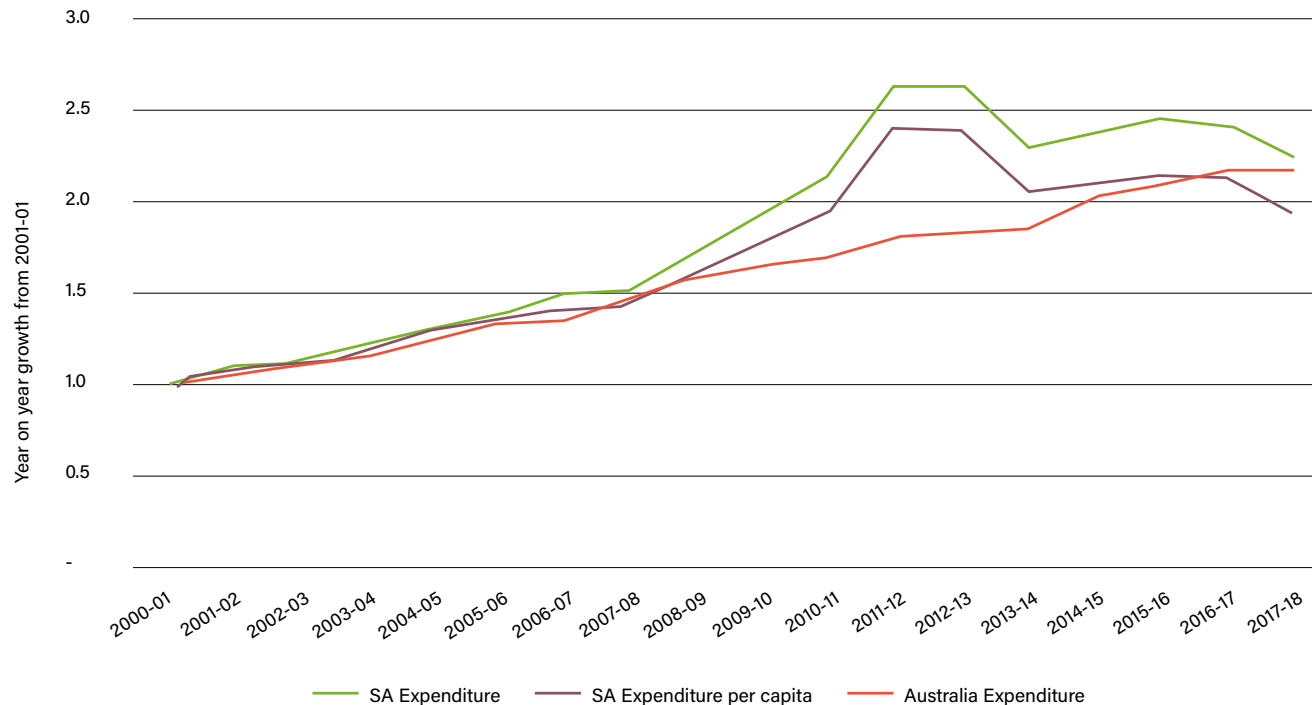
- Employee costs including wages and training (\$58 million or 58%)
- Operating and corporate expenses (\$21 million or 21%), and
- Library materials (\$8.0 million or 8%).

Expenditure by public libraries on capital works was much lower in comparison, at \$10 million in 2018-19.

Figure 3 presents the year on year change in SA total public library expenditure and per capita expenditure since 2000 (in nominal values), with a comparison to Australia’s public library expenditure overall. There has been an increase in both total and per capita expenditure in SA, which has been growing faster than the national average since 2007-08.

Expenditure per capita in SA has grown at a slower rate than total expenditure in recent years, suggesting that while public library expenditure is increasing, it has not kept pace with population growth.

FIGURE 3: PUBLIC LIBRARY EXPENDITURE FROM 2000-01 TO 2017-18



Source: Australian Public Libraries Statistical Report, NSLA and SA Public Library Services Annual Statistics 2017/18

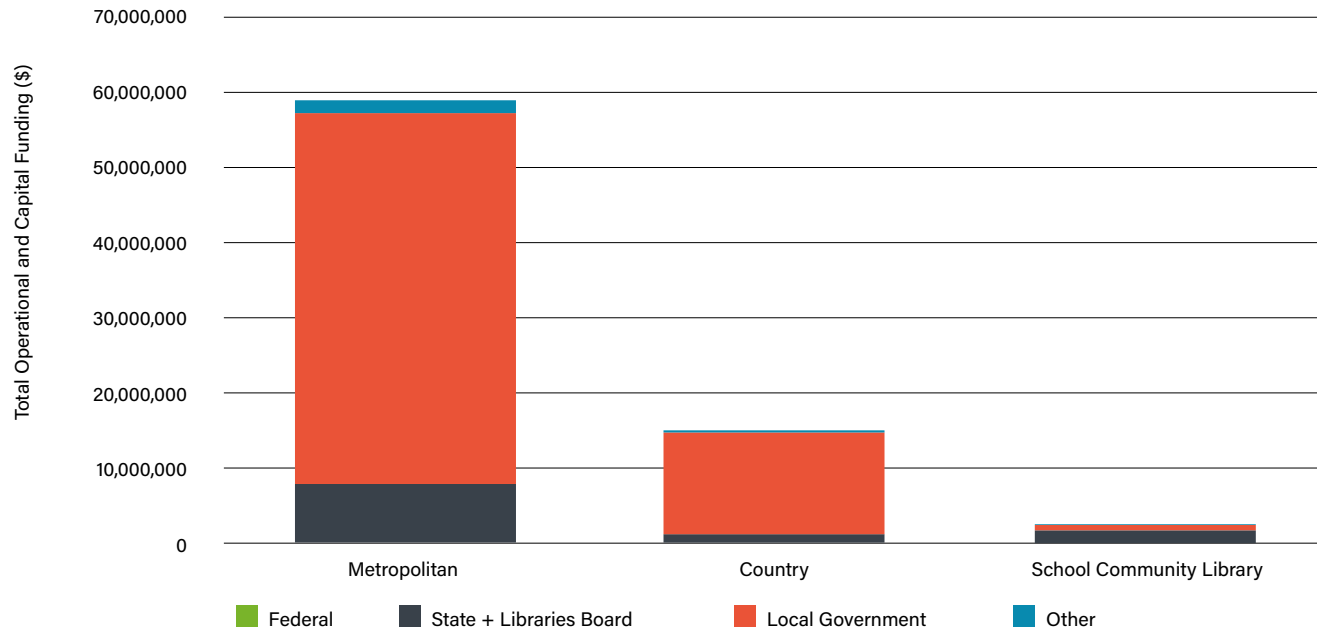
2.5 Funding for public libraries

In 2018-19 over 84% of South Australia’s public library operational funding was sourced from local government. State government and the Libraries Board (PLS) contribute some recurrent funding

(approximately 12%), but very little is received from other sources including the Commonwealth government. Capital funding is also predominantly sourced from local government.

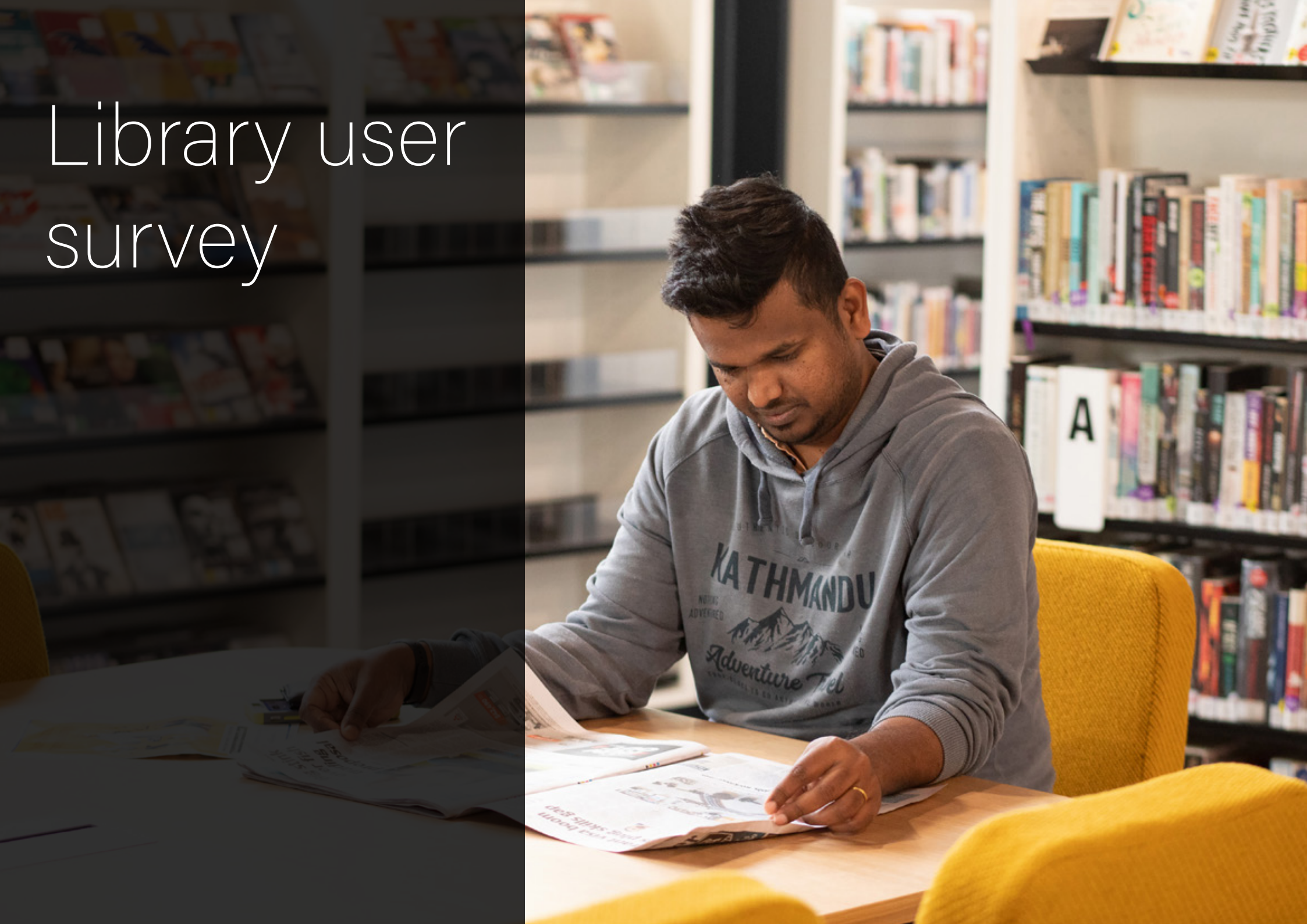
Figure 4 highlights the large proportion of funding that is received from local government.

FIGURE 4: SOURCE OF FUNDING BY LIBRARY TYPE 2018-19



Source: SA Public Library Services Annual Statistics 2017/18

Library user survey



This section describes how case study libraries were selected, the survey of library users conducted at these case study locations, as well as some of the key results of the survey.

3.1 Overview of visitor survey

A survey of visitors collected information about people who use public libraries across South Australia, including how they use various library services and the benefits they receive. The results of this survey have been used to estimate the community benefits and economic activity generated by public libraries in South Australia.

The survey included 26 questions, covering a range of topics including: how often people visit, what activities are undertaken when they visit, suggested improvements, travel distance to the library, spending on the library visit, willingness to pay for library services, and demographic questions. The survey was conducted online and at six selected case study libraries.

The following sections outline how the six case study libraries were selected as well as an aggregate summary of the survey results. The full visitor survey is provided in Appendix 1.

3.2 Case study library selection

SGS used a statistical technique (principal component analysis) to categorise all public libraries in South Australia into six groups which had similar characteristics.

One library from each group was then selected as the case study library which would survey its visitors.

Results from the visitor survey at each case study library have been applied to all libraries in that group, given their similar characteristics.

In categorising all public libraries in South Australia, the following data sources were used:

- SA Libraries Annual Statistics 2017-18 – visitors, operating expenses, funding, membership, program attendance, etc.
- ABS Census data 2016 – demographic variables such as population, SEIFA, employment status, income levels, family and household configuration, ages of population, etc

Statistical analysis of the above datasets found that the variables that differentiate public libraries the most were:

- Size of local community served (population)
- Size of library operations (operating expenditure)
- Library location (commercial centres vs residential areas)
- Nature of funding sources (school or non-school libraries)
- Socio-economic status of local community (SEIFA).

Each library service was then grouped, using these variables, into the following categories:

- Group A: Metro & moderate size community served (around 40,000 residents)
- Group B: Metro & large size community served (around 80,000 residents)
- Group C: Metro & very large community served (around 130,000 residents)
- Group D: Regional centres (community served around 20,000 residents)
- Group E: Rural and remote towns / school libraries (community served <3,000 residents)
- Group F: Adelaide City (resident catchment of 23,000, but many more visitors).

Following consultation with Public Libraries South Australia, the following libraries were selected as the six case studies. These libraries were responsible for distributing the visitor survey and ensuring the targeted response rates were achieved.

The six case studies included:

- Unley (Group A)
- Port Adelaide Enfield (Group B)
- Tea Tree Gully (Group C)
- Murray Bridge (Group D)
- Kingston (Group E)
- Adelaide City (Group F)

The best thing about the library is its physical presence and resources; a friendly, homely, welcoming place to spend time in and to feel part of the community.

- South Australian resident

The library was a peaceful place to be when I was job hunting and did not have a computer. It enabled me to get a job.

- South Australian resident

3.3 Results of visitor survey

This section presents a summary of the results from the visitor survey for all case study libraries collectively.

Frequency of library visit

40% of those surveyed visited the public library at least once a week, 20% visited at least once a fortnight and 24% visited at least once a month. 16% visited less than once a month, while only 1% of this group visited less than once a year. This suggests that library users visit libraries regularly.

The frequency of visit varies by the type of visitor, particularly by employment status. Those who are looking for work, retired or a full-time student visited the public library more frequently than users who were employed or who had domestic duties.

Time spent at the library

Survey respondents spent 53 minutes at the library on average. This varied depending on the frequency of visit, age group and employment status of visitors.

Those who visited once a week spent longer, 70 minutes on average, compared with those who visited less frequently, who spent between 41 and 43 minutes on average.

Time spent also varied by age group, with those aged under 30 spending 70 minutes on average, compared with those aged 60 and older, who spent 47 minutes on average.

Not surprisingly, the time spent at the library also varied by employment status, with full time students spending 95 minutes on average, those looking for work spending 78 minutes on average and those with domestic duties spending 56 minutes on average (Table 4).

Staff are very helpful when I'm looking for something. There is always something new happening so each visit is an opportunity to learn new things or be part of something.

- South Australian resident

FIGURE 5: FREQUENCY OF LIBRARY VISIT

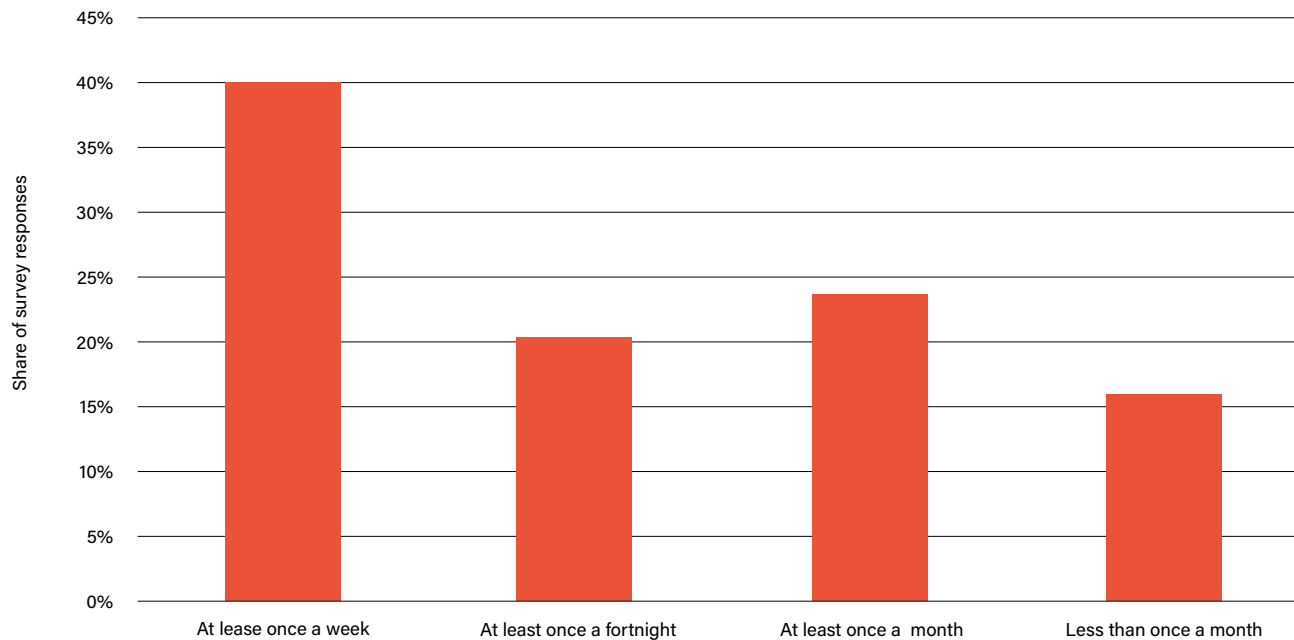
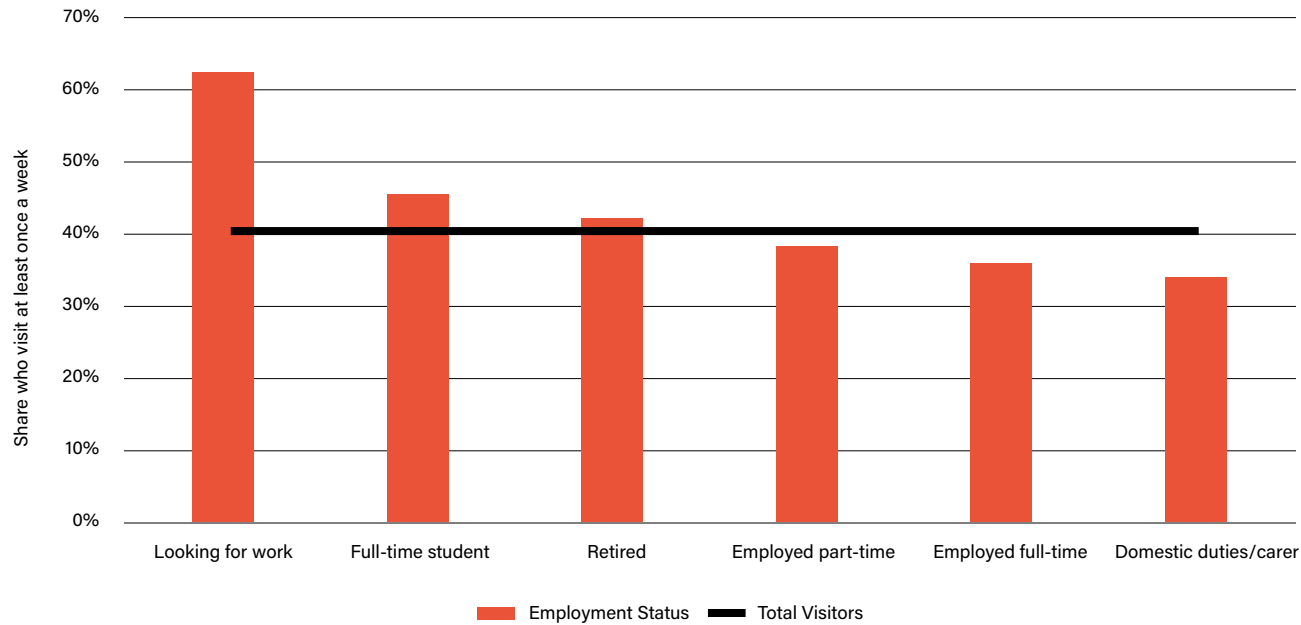


FIGURE 6: FREQUENCY OF LIBRARY VISIT BY EMPLOYMENT STATUS



Source: SGS Library Visitor Survey 2019

TABLE 4: AVERAGE TIME SPENT AT LIBRARY BY VISITOR TYPE

Total Visitors	53 minutes				
Frequency of visit	<i>At least once a week</i>	<i>At least once a fortnight</i>	<i>At least once a month</i>	<i>Less than once a month</i>	
	70 minutes	43 minutes	41 minutes	43 minutes	
Age group	<i>Under 30 years</i>	<i>30-39 years</i>	<i>40-49 years</i>	<i>50-59 years</i>	<i>60+ years</i>
	70 minutes	59 minutes	55 minutes	52 minutes	47 minutes
Employment status	<i>Employed (full time & part time)</i>	<i>Looking for work</i>	<i>Retired</i>	<i>Domestic duties/carer</i>	<i>Full-time student</i>
	50 minutes	78 minutes	49 minutes	56 minutes	95 minutes

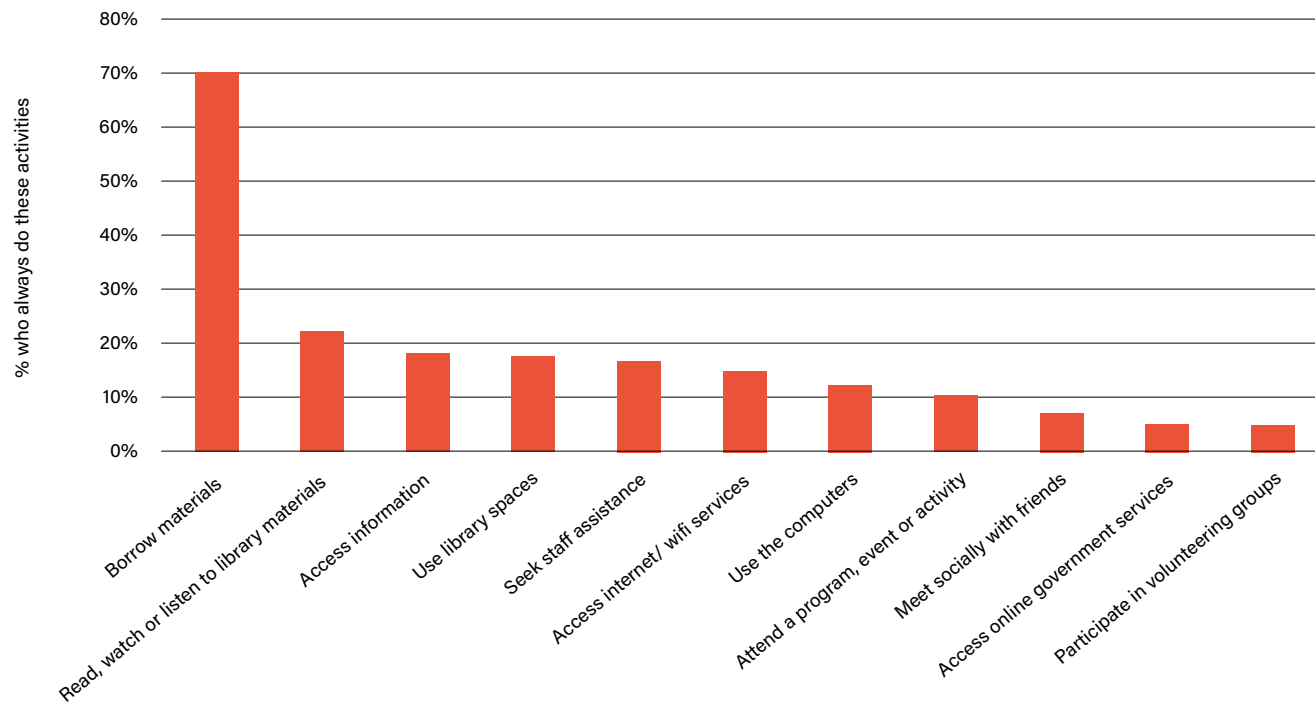
Source: SGS Library Visitor Survey 2019

Activities at the library

The most common activity for library visitors was to borrow materials, with 70% of survey respondents saying they always undertake this activity when visiting a library. Other activities that visitors always undertake include:

- Read, watch or listen to library materials (22%)
- Use library spaces (18%)
- Access information (18%)
- Seek staff assistance (17%), and
- Access the internet / wifi services (15%) (Figure 7).

FIGURE 7: SHARE OF RESPONDENTS WHO ALWAYS UNDERTAKE ACTIVITIES BY ACTIVITY TYPE



Source: SGS Library Visitor Survey 2019

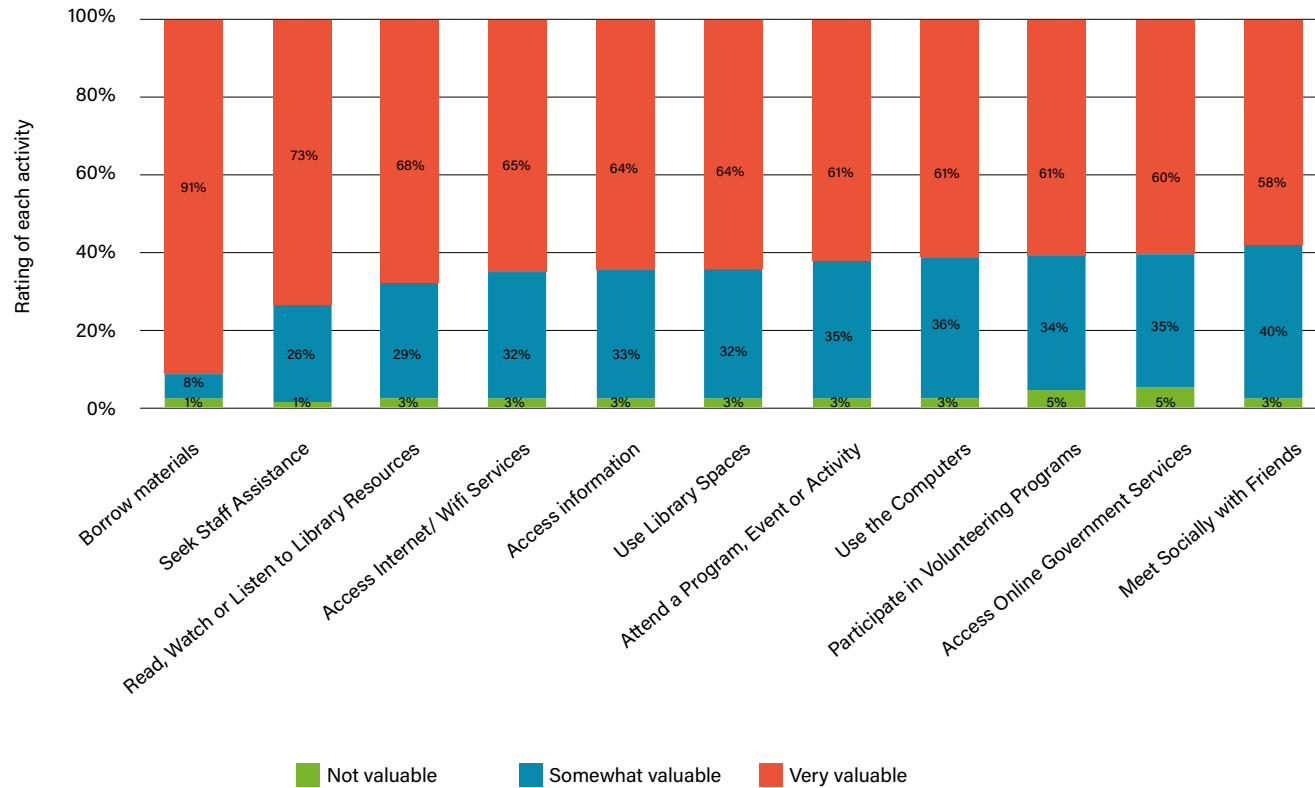
The free baby programs are amazing for new mums. I have also started utilising the borrowing service and can't speak highly enough of the ability to return to any library.

- South Australian resident

Perceived value of library activities

Most activities rated very highly in terms of their perceived value, with 91% of those surveyed rating borrowing materials as very valuable. Seeking staff assistance (73%), Accessing internet/wifi services (65%) and Using library spaces (64%) also had a high proportion of respondents rating them as very valuable (Figure 8).

FIGURE 8: SHARE OF RESPONDENTS WHO RATE EACH ACTIVITY – VERY, SOMEWHAT AND NOT VALUABLE



Source: SGS Library Visitor Survey 2019



Travel to the library

On average, survey respondents spent 13 minutes travelling to get to the library. This varied by age group, with those under 30 spending 16 minutes on average. It also varied by employment status, with those looking for work spending 16 minutes on average, full time students spending 14 minutes on average, and those with domestic duties spending 12 minutes on average (see Table 5).

Car was the most common mode of transport for travel to the library, with 69% of survey respondents travelling by car. 21% of survey respondents walk or ride a bike to the library, while 9% took public transport, and 2% used other modes (mostly combined mode trips).

Visitors aged under 30 years were more likely to walk or ride (27%) and take public transport (19%), while all other age groups were more likely to drive.

Our local library plays an integral part in keeping us all connected as a community.

- South Australian resident

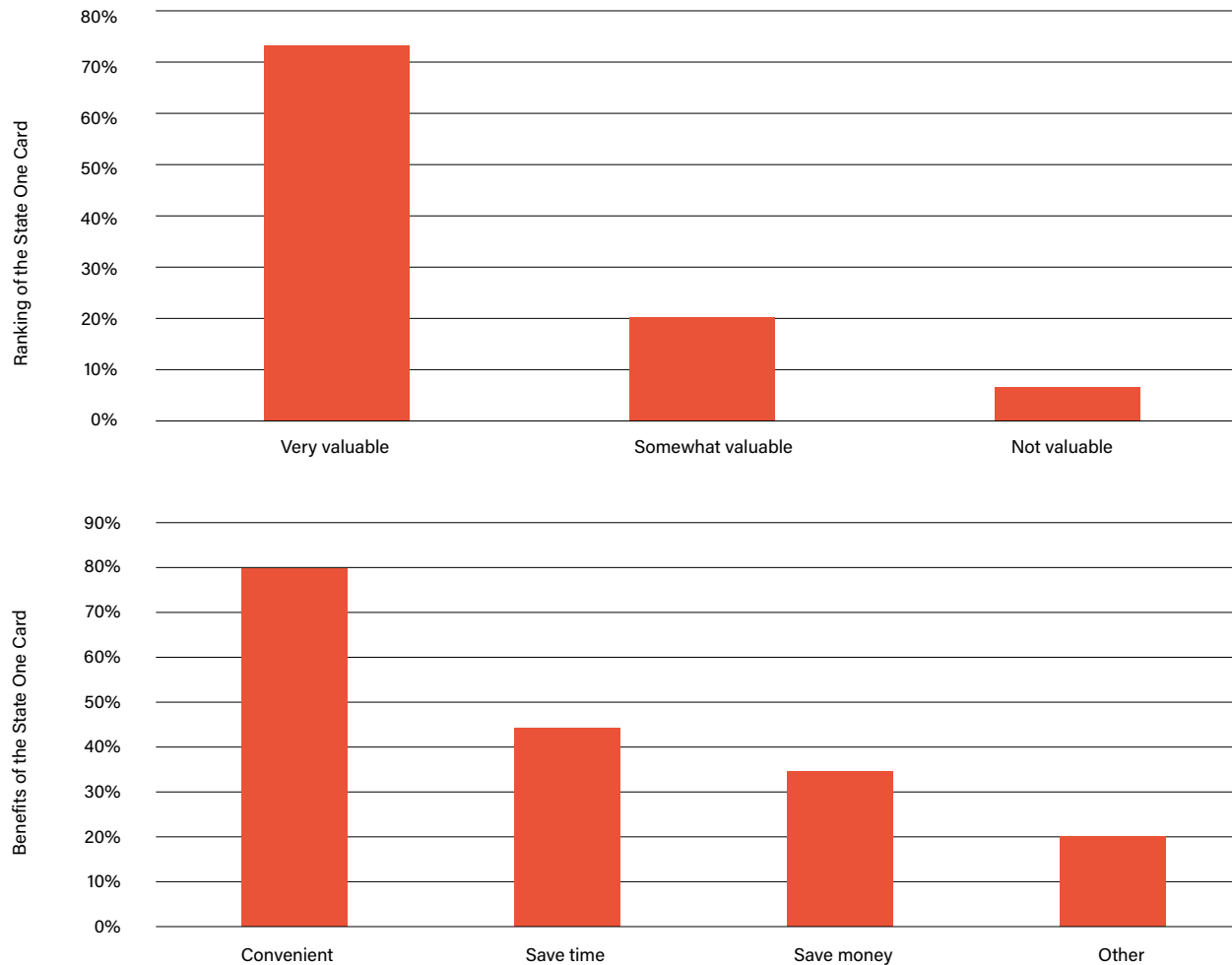
TABLE 5: AVERAGE TIME SPENT TRAVELLING TO THE LIBRARY BY VISITOR TYPE

Total Visitors	13 minutes				
Frequency of visit	<i>At least once a week</i>	<i>At least once a fortnight</i>	<i>At least once a month</i>	<i>Less than once a month</i>	
	13 minutes	12 minutes	13 minutes	12 minutes	
Age group	<i>Under 30 years</i>	<i>30-39 years</i>	<i>40-49 years</i>	<i>50-59 years</i>	<i>60+ years</i>
	16 minutes	12 minutes	12 minutes	12 minutes	12 minutes
Employment status	<i>Employed (full time & part time)</i>	<i>Looking for work</i>	<i>Retired</i>	<i>Domestic duties/ carer</i>	<i>Full-time student</i>
	12 minutes	16 minutes	13 minutes	12 minutes	14 minutes

State One Card

Over 74% of survey respondents rated the State One Card as very valuable, with only 6% rating it as not valuable. The main benefit was that it is convenient (79% of responses), saves time (44% of responses), and saves money (34%). Other benefits included having access to a wider variety of resources, particularly in rural areas, as well as making it easier to visit the library on holiday in other parts of the state.

FIGURE 9: STATE ONE CARD VALUE & BENEFIT



The State One Card let me borrow a wider range of books & explore new areas / libraries at the same time.

- South Australian resident

Cost benefit analysis



MAKER
SPACE

This section outlines the benefits and costs of public libraries, and how these are contrasted to assess the net benefits generated for the South Australia community. The results indicate that the benefits of public libraries are almost three times their costs.

4.1 Value of public libraries

The benefits generated by public libraries encompass the direct and indirect benefits derived by users, as well as the benefits derived by the wider community, i.e. non-users.

The net value of public libraries is most commonly assessed using cost benefit analysis (CBA). CBA is the preferred tool of Australian governments for assessing whether a proposed investment is worthwhile, or if an earlier investment has been worthwhile, taking into account economic, social and environmental considerations.

The strength of CBA lies in its attempt to quantify and monetise, wherever possible, relevant costs and benefits. It then contrasts monetised costs and benefits in directly comparable units.

The table below outlines the costs and benefits of public library services and the measurement technique used for each.

TABLE 6: IDENTIFIED COSTS AND BENEFITS OF PUBLIC LIBRARY SERVICES

Type	Description	Measurement Technique
COSTS		
RECURRENT OPERATING COSTS	Expenditure on library materials, staff salaries, training and other administrative costs	Actual costs from SA Public Library Services Annual Survey (2017/18)
BENEFITS		
USE	Direct	Direct benefits to library users: <ul style="list-style-type: none"> — Access to materials, collections, services & programs — Access to library equipment and spaces — Access to technology — Improved language & digital literacy — Social interaction
	Indirect	Indirect benefits to library users: <ul style="list-style-type: none"> — Complement to education services — Facilitation of career development — Contribution to community health — Improved local neighbourhood amenity — Environmental savings
NON-USE	Option	Preservation of option for future use
	Existence	Perceived value & significance to the community
	Legacy	Value of preservation for future generations

³Parameters derived from the 2019 Visitor Survey conducted at six SA case study libraries

⁴Parameters derived from the Victorian Publication *Dollars, Sense & Public Libraries* (2011) survey of 1,050 non-user households have been updated and applied to current non-user populations in SA.

Direct user benefits

Library users experience direct use benefits from public libraries and place a value on this use. Direct user benefits include:

- **Access to library materials, collections, services & programs** (physical and digital) – widely acknowledged as the key benefit to users. Public libraries provide information and services to members of the local community who may not be able to afford retail prices for access to the collection, internet and library programs.
 - Materials include the vast collection of physical and digital books, newspapers, journals and other publications.
 - Collections include current and popular materials, research and archival materials on the South Australian economy, history and culture.
 - Services provided by library staff such as helping to locate resources or answering questions are also a key benefit.
 - Library programs are delivered for the benefit of children, youth, adults, seniors and culturally and linguistically diverse (CALD) community members to support literacy, culture, workforce development and lifelong education. Programs provide a pathway to further education and training, prevent social isolation and connect communities through recreational and cultural activities.
- **Access to library equipment and spaces** – equipment and spaces provided by the library vary according to local community needs. Spaces and supporting services are provided for immunisation clinics, Justice of the Peace services, family meetings in neutral spaces, library programs and community meetings.
- **Access to technology, including computers with internet access and online services** – Public libraries provide access to computers with internet which provide benefits for those who may not have access to or be able to afford internet devices, particularly for disadvantaged communities. Providing this access to technology is vital in the context of South Australia's digital competitiveness, which ranked seventh out of Australia's eight States and Territories in the Australian Digital Inclusion Index 2019 report published by RMIT, Swinburne and Telstra⁵.
- **Improved language and digital literacy gained at the library** – the services and programs provided by public libraries make a significant contribution to literacy and language, through the materials, services and programs offered. For example, early learning programs offered by libraries build stronger local social and economic capacity over the long term. SA Public Libraries support readers at all stages of learning by offering broad and easy access to collections in a range of formats, languages, and reading levels.
 - Use of library collections in a variety of formats supports literacy and literary engagement, lifelong learning, employment, entrepreneurship and fosters creativity and innovation of thought. Higher levels of literacy skill are associated with more stable employment, higher wages, better health, increased educational achievement, and higher levels of social engagement. Literacy influences the performance of educational institutions, businesses and communities.
- **Social interaction gained at the library** – public libraries are commonly viewed as neighbourhood and community hubs, where people can meet and exchange ideas and information in a space that is safe and welcoming.

The best thing about the library is the access to books and DVDs which I could not afford to buy, thus expanding my opportunities.

- South Australian resident

I appreciate the community services the library provides, while I don't generally access them myself (e.g. wifi, photocopying). I use the library mostly for borrowing books (some physical, some ebooks).

- South Australian resident

⁵Thomas, J, Barraket, J, Wilson, CK, Rennie, E, Ewing, S, MacDonald, T, 2019, Measuring Australia's Digital Divide: The Australian Digital Inclusion Index 2019, RMIT University and Swinburne University of Technology, Melbourne, for Telstra. https://digitalinclusionindex.org.au/wp-content/uploads/2019/10/TLS_ADII_Report-2019_Final_web_.pdf

Indirect user benefits

Library users also experience a range of indirect benefits, including:

- **Complement to education services** – public libraries complement education institutions through the provision of services and programs; providing reinforcing and complementary services that are additional to those offered at schools and at tertiary education institutions. Partnerships between libraries and government/ other agencies allows for broader strategic objectives to be met, particularly in the education sector.
- **Facilitation of career development** – libraries facilitate job search activities by providing free access to the internet, as well as on-going learning through access to services and programs. Both have been shown to contribute to career development outcomes.
- **Contribution to community health** – general information provided through library collections, as well as library programs that focus on raising awareness with respect to health issues, contribute to improving community health outcomes.
- **Improved local neighbourhood amenity** – public libraries are seen to improve the physical attractiveness of an area while also creating a sense of place within the local community.
- **Environmental savings** – multiple borrowings of library print and non-print materials is more resource friendly than individual ownership, thus generating environmental savings.
- **Efficient and equitable sharing of resources** – the OneCard system, unique to South Australia, provides an efficient sharing of resources across all SA public libraries. This allows the community to access a broader range of collections at any library, which saves on travel costs, and provides equitable access across metropolitan, country and school community libraries.

Non-user benefits

Non-users also place a value on public library services, even though they do not experience the user benefits identified above. This value stems from the following benefits.

- **Option value** – although an individual may not use/ visit a library, the knowledge that it will be indefinitely accessible in the future creates what is known as an “option value”. In this case, there is an understanding that if the library services were discontinued, the individual would feel a quantifiable loss.
- **Existence value** – this reflects individual perceptions of how public libraries contribute to the basic and essential elements of a local community. In essence, some non-users are willing to pay for public libraries so that others can benefit from their services.
- **Legacy value** – individuals and communities value maintaining public libraries just so future generations might benefit from their existence. This cultural and historical legacy stems from the feeling of obligation and responsibility towards future generations, particularly around places that have perceived community value and/ or operate to meet community needs.

Costs

The costs of delivering public library services include recurrent expenditures on library materials, staff salaries and other administrative costs.



4.2 Monetisation techniques

Measuring the benefits of public libraries is not as straightforward as measuring the costs, because they are not traded in the market place as they are public goods, largely provided free of charge. Consequently, market prices do not exist for these benefits.

Non-market valuation techniques can be used to measure the benefits of public libraries, which provide a range for the likely magnitude of benefits. These techniques include:

- **Travel/ opportunity costs** – this method estimates the value of time, cost and effort that library users incur utilising public library services. In essence this method assumes that the value derived by users must outweigh the costs incurred, otherwise users wouldn't make the visit.
- **Financial savings** – this method values the services offered by public libraries by asking users to estimate the costs they would incur if similar services were provided by substitute, private sector providers.
- **Contingent valuation** – this method asks library users and non-users how much they would be willing to pay to keep public library services on offer in their respective communities.

SGS has used the travel/ opportunity costs method to quantify the user benefits of public libraries in South Australia; employing the results from the 2019 library visitor survey conducted as part of this study. As outlined in Section 3.2, the application of case study library results, have been informed by extensive statistical analysis, ensuring a robust application process.

A 2011 report prepared by SGS for Victorian Public Libraries used all three valuation techniques to measure the value of public libraries. The results generated were within a reasonable range, and in each location the travel/ opportunity cost method produced the midpoint result for user benefits.

SGS has used the contingent valuation method to quantify the non-user benefits, using parameters derived from the Victorian Publication Dollars, Sense & Public Libraries (2011). The parameters have been updated to 2019 dollars and applied to current non-user populations in SA. Significant primary research was conducted in this previous Victorian study, including a survey of 1,050 non-user households.

4.3 Results

Table 7 presents the results of the cost benefit analysis at a state-wide level.

Public libraries in South Australia generated \$251.7 million of benefits in 2018-19. After accounting for the costs of operating public libraries, the net community welfare contribution is estimated at \$162.9 million.

This equates to \$95 per capita per year in net community benefits from public libraries.

A benefit cost ratio (BCR) compares the estimated benefits to the costs to determine the level of return. If the ratio is above 1, then the benefits outweigh the costs. The BCR for all of South Australia's public libraries was 2.8. This means that for every dollar invested in public libraries in South Australia, \$2.80 of benefits were generated for the community.

The costs and benefits vary across the three types of public libraries, as does the benefit cost ratio. Results for metropolitan, country and school community libraries are shown in Table 7. The BCR for each public library type ranges between 2.3 for country libraries and 2.8 for metropolitan libraries, and then up to 4.4 for school community libraries.

The library is a wonderful source of knowledge and fun activities for me and my kids.

- South Australian resident

TABLE 7: COST BENEFIT ANALYSIS RESULTS (2017/18) – SOUTH AUSTRALIA

	South Australia
Costs	\$88.8 million
Benefits	
— User benefits	\$176.8 million
— Non-user benefits	\$74.9 million
Total Benefits	\$251.7million
Benefit cost ratio (BCR)	2.8
Net Benefits (benefits – costs)	\$162.9 million
Net Benefits per capita	\$95

Source: SGS Economics & Planning based on Libraries SA Annual Statistical Survey

TABLE 8: COST BENEFIT ANALYSIS RESULTS (2017/18) – BY LIBRARY TYPE

	Metropolitan Libraries	Country Libraires	School Community Libraries
Costs	\$64.1 million	\$18.7 million	\$6.0 million
Benefits			
— User benefits	\$120.5 million	\$31.8 million	\$24.5 million
— Non-user benefits	\$61.2 million	\$12.0 million	\$1.7 million
Total Benefits	\$181.7 million	\$43.8 million	\$26.2 million
Benefit cost ratio (BCR)	2.8	2.3	4.4
Net Benefits (benefits – costs)	\$117.6 million	\$25.1 million	\$20.2 million
Net Benefits per capita	\$89	\$80	\$238

Source: SGS Economics & Planning based on Libraries SA Annual Statistical Survey

Economic impact assessment



Public libraries generate economic activity through their operating expenditures and through triggered spending of library users. This section outlines how the significant economic impacts generated across South Australian communities accumulate.

5.1 Overview

Public libraries generate economic activity from their operating expenditures, and also via the expenditures that library users make as a result of their library use. The economic activity generated is measured through impacts to the local value generated in the economy (gross regional product) and the local employment supported (full time equivalent jobs).

Economic impact assessment (EIA) is a tool used to trace how public library service expenditures trigger other transactions in the local economy and accumulate through multiple rounds of buyer/supplier transactions. EIA is distinct from a CBA as it only looks at the economic impacts, rather than assessing whether public libraries provide a net benefit to the community.

The of EIA and CBA results are independent and should not be added together.

5.2 Method

For the economic impact analysis SGS utilised a Computable General Equilibrium (CGE) model maintained by EY. CGE modelling is the most robust way to assess economic impacts, as these models are calibrated to account for:

- Underutilised capacity in regional economies
- Price, competition and crowding out effects, and
- Dynamic relationships between and within industries (e.g. productivity).

The direct impacts of public libraries, as measured by the economic stimulus generated, is used to 'shock' the CGE model, which then estimates the indirect economic.

The economic stimulus includes:

- Public library services operating expenditures (2017/18)
- Public library user triggered spending (sourced from the 2019 library visitor survey).

The two key outputs from the CGE modelling are the impacts to gross regional product (GRP) and employment.

- GRP is a commonly used measure of the value created in a regional economy (i.e. total income less the value of input supplies of goods and services).
- In generating this economic value, employment is also simultaneously created or supported in the regional economy. Employment is measured in terms of full-time equivalent (FTE) jobs.

Further details of the EIA method can be found in the appendices.

The library has a lot of space for reading and relaxing, friendly and helpful staff and it is easy to access as its close to the shopping centre and gym.

- South Australian resident

5.3 Economic stimulus

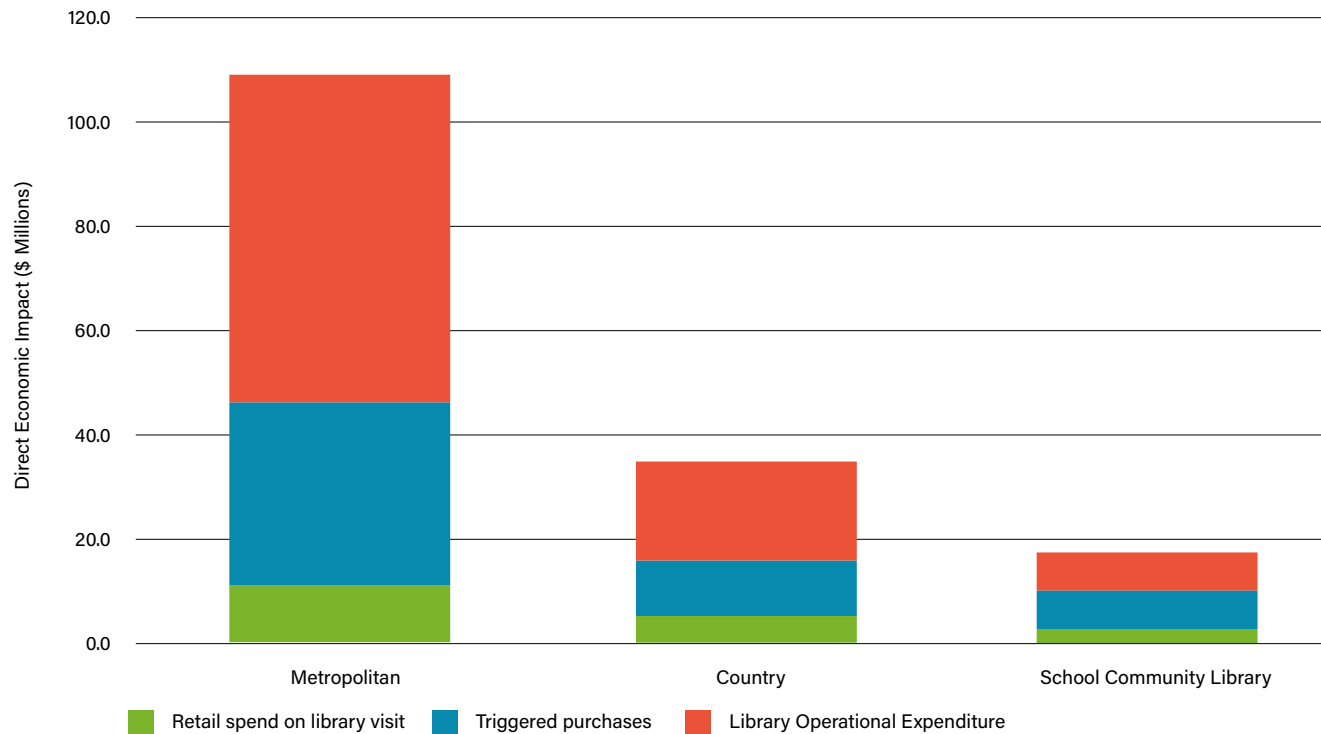
The direct economic impact (stimulus) generated by public libraries in South Australia was \$162 million per year (2017-18).

- \$89 million was generated by public library operational expenditure (55% of total stimulus).
- \$54 million was generated by library user triggered spending resulting from visiting the library (33%), such as buying an iPad after attending a class at the library.

- \$19.5 million was generated by library user retail spending during their visit to the library (12%), such as buying a coffee or lunch.

Figure 10 shows the direct economic impacts (stimulus) generated by each type of public library in South Australia. Metropolitan libraries generated the largest economic stimulus of \$109 million. Country libraries generated \$35 million and School Community Libraries generated \$18 million in direct impacts to the regional economy.

FIGURE 10: DIRECT ECONOMIC IMPACTS BY LIBRARY TYPE (\$ MILLION)



5.4 Results

Table 9 presents the results of the economic impact assessment for South Australia. Economic activity generated by public libraries equates to \$114.5 million in Gross Regional Product in 2017-18. Almost 64% of this value added is generated in Greater Adelaide (\$73.6 million per year).

Public libraries directly employ approximately 680 FTE staff. The multiple rounds of buyer/ supplier transactions that are set in motion by public library linked expenditures support an additional

95 jobs in the South Australian economy. Therefore, the total impact to employment is 775 full time equivalent jobs across the state.

The economic impacts vary by library type and across each public library service. Library services that have low operating expenditures, lower visitation levels and which are situated in less developed/ expansive local economies have a smaller economic impact than larger library services with high visitation in well-developed/ expansive local economies.

TABLE 9: ECONOMIC IMPACTS OF PUBLIC LIBRARIES (2017/18) – SOUTH AUSTRALIA

	South Australia	
	\$ million	Employment (FTE)
Direct Expenditure Impact	162.0	680
Total Gross Regional Product Impact	114.5	775

Source: SGS Economics and Planning and EY

TABLE 10: ECONOMIC IMPACTS OF PUBLIC LIBRARIES (2017/18) – BY LIBRARY TYPE

	Metropolitan Libraries	Country Libraries	School Community Libraries
Gross Regional Product (\$ million)	73.6	27.1	13.8
<i>Employment (FTE)</i>			
— Direct	486	130	64
— Indirect	44	34	17
Total Employment	530	164	81

Source: SGS Economics and Planning and EY

Appendices

Questionnaire

This survey aims to collect information about people who use public libraries in South Australia. It asks about how you use the library and the benefits you get. A particular focus of the study is to understand the value of public library services to the community.

The information from the survey will be used to show government how valuable libraries are to people in South Australia and the benefits obtained from the funding used to provide libraries.

While some questions ask about your willingness to pay for public library services, there is no intention to introduce new fees or charges. These are exploratory research questions only.

Your responses to all the questions will be kept confidential. Only grouped responses will be reported.

Question 1: What is your local library service?

(Please select one response only)

- Adelaide City
- Kingston
- Murray Bridge
- Port Adelaide Enfield
- Unley
- Tea Tree Gully
- None of these

If your local library service is not shown above, please stop this survey as your responses will not be included.

Question 2: How often do you visit your local library service?

(Please select one response only)

- At least once a week
- At least once a fortnight
- At least once a month
- Three or four times a year
- Once or twice a year
- Less than once a year

Question 3: When you visit your local library, what do you do?

(Please select as many responses as relevant to you)

	Never	Sometimes	Always
— Borrow materials (e.g. books, eBooks, digital materials)			
— Access information			
— Access online government services (e.g. my.gov.au , Centrelink)			
— Access internet/ wifi services			
— Use the computers			
— Seek staff assistance			
— Use library spaces (e.g. study, meeting, social spaces)			
— Attend a program, event or activity			
— Participate in volunteering programs			
— Meet socially with friends			
— Read, watch or listen to library materials			

Question 4: How valuable are these services to you?

(Please select a response for each of the services you use)

	Not valuable	Somewhat valuable	Always valuable
— Borrow materials (e.g. books, eBooks, digital materials)			
— Access information			
— Access online government services (e.g. my.gov.au , Centrelink)			
— Access internet/ wifi services			
— Use the computers			
— Seek staff assistance			
— Use library spaces (e.g. study, meeting, social spaces)			
— Attend a program, event or activity			
— Participate in volunteering programs			
— Meet socially with friends			
— Read, watch or listen to library materials			

Question 5: What’s the best thing about your local library service? (Open response)

Question 6: How could your local library service be improved? (Open response)

Question 7: On your last trip to your local library service, how long did it take you to travel there? (Please respond in minutes)

_____minutes

Question 8: On your last trip to your local library service, how far did you have to travel? (Please respond in kilometres)

_____kilometres

Question 9: On your last trip to your local library service, how much did it cost you in out of pocket expenses (e.g. petrol, public transport fares, etc.)?

Please enter a number without commas, e.g. \$1,000 would be entered as “1000”

_____dollars

Question 10: On your last trip to your local library service, how did you travel there? (Please select the relevant response)

- Car
- Public transport
- Walk or ride
- Other (please specify) _____

Question 11: On your last trip to your local library service, how long did you spend in the library? (Please respond in minutes)

_____minutes

Question 12: On your last trip to your local library service, how many other destinations were part of the trip (e.g. shops, cafes, school, etc)? (Please select your number of additional destinations)

- Zero additional destinations
- One additional destination
- Two additional destinations
- Three or more additional destinations

Question 13: On your last trip to your local library service, was the library visit the primary reason for making the trip? (Please respond Yes or No)

- Yes
- No

Question 14: On your last trip to your local library service, did you spend any money at these other destinations?

Please enter a number before dollars without commas, e.g. \$1,000 would be entered as "1000"

- _____dollars at the local shops
- _____dollars at a local café or restaurant
- _____dollars at other local destinations
(please specify) _____

Question 15: Has your use of the local library service prompted you to spend money on things you otherwise wouldn't have bought? If so, how much would you have spent in the last year because of the local library service?

Please enter a number before dollars without commas, eg. \$1,000 would be entered as "1000"

- _____dollars on books, magazines, CD, DVD, etc.
- _____dollars on equipment, computers, cameras, etc.
- _____dollars on memberships, tuitions, courses, etc.
- _____dollars on other items (please specify) _____

In the following questions, please imagine that funding for public libraries was no longer provided, and library users had to pay for library services. While these questions ask about your willingness to pay for public library services, there is no intention to introduce new fees or charges. These are exploratory research questions only.

Question 16: Thinking about the benefits provided by your local library service, if funding was stopped, how much would you be prepared to pay to continue to use your local library service?

Please enter a number without commas, e.g. \$1,000 would be entered as "1000"

_____ dollars a year

Question 17: Thinking about your response to the last question, please nominate which of the following best describes your response? (Please select one response)

- The amount is what I think libraries are worth
- Libraries are worth MORE than this, but I can't afford more/ don't want to pay more
- Libraries are currently worth LESS than this, but extra funds could improve services
- Other (please specify) _____

The following questions are about the State One Card: SA library customers can use any public library across SA with a single card, and have access to over 3.7 million items. The 'One Card' network connects more than 130 public libraries across the State and provides convenient access for the whole community to the entire public library collection.

Question 18: How valuable is the State One Card to you?

(Please select your response)

- Not valuable
- Somewhat valuable
- Very valuable

Question 19: How does the State One Card benefit you?

(Please select responses that are relevant to you)

- It saves me time
- It saves me money
- It is very convenient
- Other (please specify) _____

The following questions are asked so we can check that responses to this survey are not biased towards any particular community group. The data will not be used for any other purpose.

Question 20: Are you a member of your local library service?

(Please respond Yes of No)

- Yes
- No

Question 21: How old are you? (please respond in years)

_____years

Question 22: In which postcode do you live? (Please type your 4 digit postcode here. Algorithm checks that 4 numbers have been entered.)

_____postcode

Question 23: Where were you born?

(Please respond by nominating your region of birth)

- Australia
- Asia
- Africa
- Europe
- Middle East
- North America
- South America

Question 24: Which gender are you? (Please respond by nominating your gender)

- Male
- Female
- Other (please specify) _____

Question 25: Which of the following best describes your employment status? (Please select one of the response categories)

- Employed full-time
- Employed part-time
- Looking for work
- Retired
- Domestic duties/carer
- Full-time student

Question 26: What is your approximate income before tax each year? (Please select one of the response categories)

- Under \$25,000
- \$25,000–\$39,999
- \$40,000–\$59,999
- \$60,000–\$79,999
- \$80,000–\$99,999
- \$100,000–\$119,999
- \$120,000–\$149,999
- \$150,000–\$199,999
- Over \$200,000
- Rather not say

Many thanks for giving your thoughts about public libraries. The information from all the surveys will be compiled into a report that will give an overall picture of how South Australians value their public libraries.

Response rate and demographics

Table 11 lists the number of responses received from each case study library. These are all at or above the target response number, except for Kingston. However, based on the lower number of visitors to Kingston library this is considered a sufficiently representative sample.

Of the 1,899 responses received in the survey, 42% were aged 60 years and older. 15% were aged 50 to 59 years, 17% were aged 40 to 49 years and 16% were aged 30 to 39 years. 10% were aged under 30 years.

75% of survey respondents were born in Australia, 15% were born in Europe and 7% were born in Asia.

36% of survey respondents were retired, 23% were employed full time, and 24% were employed part time. 8% of survey respondents were undertaking domestic duties/caring, 5% were looking for work and 4% were full time students.

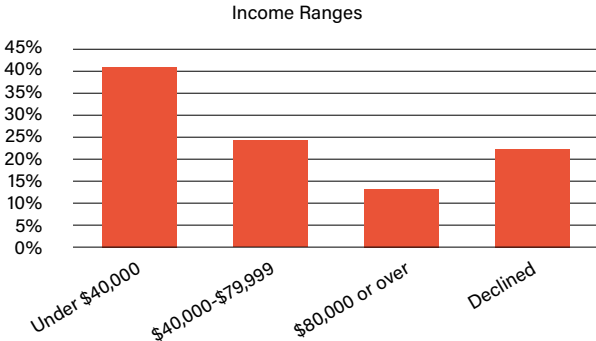
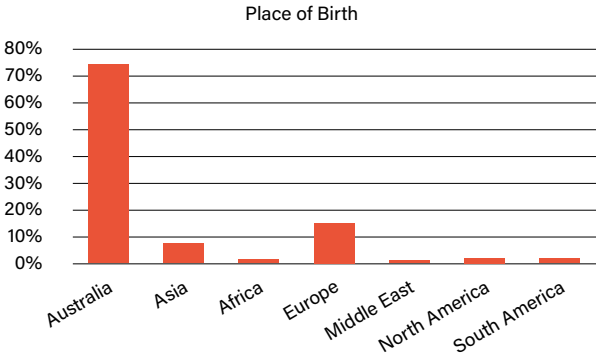
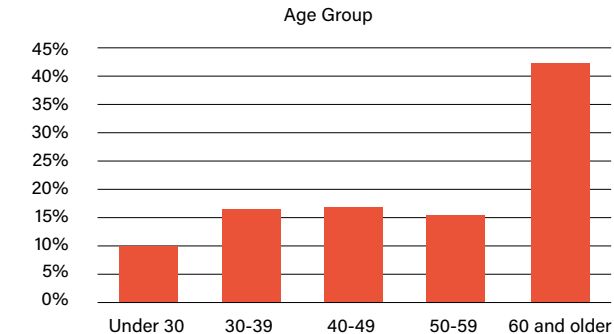
41% of survey respondents were in the under \$40,000 income bracket, 24% were in the \$40,000 to \$80,000 income bracket and 13% were in the \$80,000 or above income bracket (annual average income). 22% of survey respondents declined to answer this question.

TABLE 11: NUMBER OF RESPONSES FROM EACH CASE STUDY LIBRARY

Case Study Library	No. responses	Number of visitors 2017/18
Adelaide City	280	499,027
Kingston	103	45,000
Murray Bridge	425	54,734
Port Adelaide Enfield	428	399,408
Unley	303	176,613
Tea Tree Gully	360	373,261
Total	1,899	1,548,043

Source: SGS Library Visitor Survey 2019

FIGURE 11: SURVEY RESPONDENTS DEMOGRAPHIC PROFILE



Source: SGS Library Visitor Survey 2019

Appendix 2: Cost benefit analysis - key assumptions

Figure 12 presents an overview of methods used to estimate the benefits in the cost benefit analysis, highlighting the key inputs and assumptions that have been used.

User benefits

From the 2019 library visitor survey conducted for this study for six case study libraries, we have adopted:

- Travel time to the library (between 10 to 17 minutes)

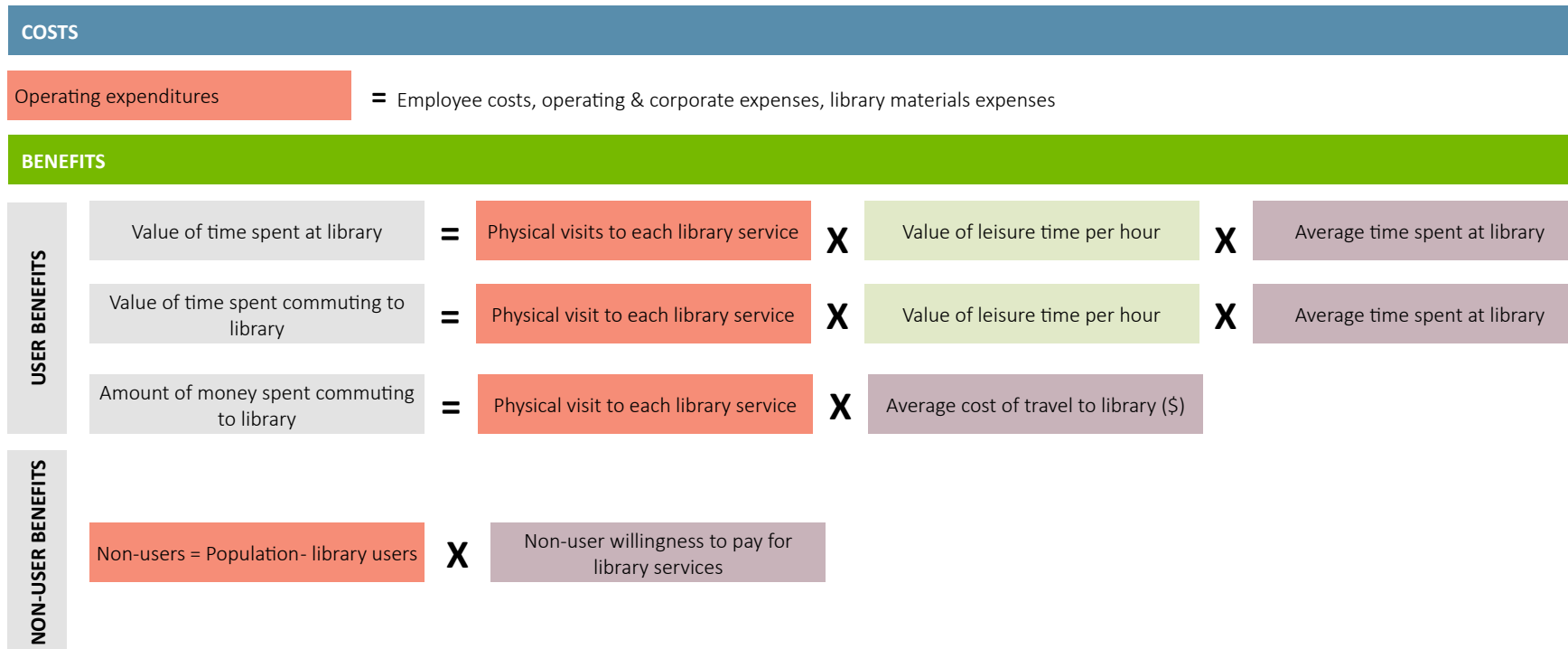
- Time spent at the library (between 41 to 73 minutes per visit)
- Cost of travel to the library (between \$1.80 to \$4.70 per visit).

Non-user benefits

Assumptions from the Victorian 2011 study (Dollars, Sense & Public Libraries) that have been updated include:

- Non-user willingness to pay for library services (\$63 per user in 2019 dollars – sourced from 2011 Victorian household survey).
- Library users have been estimated for each library using the total number of library visits (data from the 2017/18 SA Public Library Survey) and the response to the 2019 visitor survey question on frequency of visit.

FIGURE 12: MONETISATION METHODS



Appendix 3: Economic impact assessment method

The modelling framework

Computable General Equilibrium models are the framework of choice for measuring the economic impact of major investments and development projects.

The model used to assess the economic impacts of public libraries is EY's in-house Computable General Equilibrium Model, which is a multi-region, multi-sector representation of both the Greater Adelaide and Regional SA economies.

The model allows analysis of large scale investments in a single, robust, integrated economic framework. This model projects changes in macroeconomic aggregates such as Gross Regional Product (GRP), Gross Regional Income (GRI), investment, employment, and real wages increases as the result of public libraries operations.

The model meets the standards of both industry and academia, providing clients with a single, robust, integrated economic framework in which to analyse economic developments over time.

Like all economic models, EY's model is based on a range of assumptions, parameters and data that constitute an approximation to the working structure of an economy. Its construction has drawn on the key features of other economic models such as the global economic framework underpinning models such as GTAP and GTEM, with state and regional modelling frameworks such as Monash-MMRF and TERM.

EY's model is a dynamic model that solves year-on-year over a specified timeframe. The model is then used to project the relationship between variables under different scenarios, or states, over this period. The modelling task therefore involves undertaking a business-as-usual, or no policy change, scenario and comparing this with the policy change scenarios.

EY's model determines regional supplies and demands of commodities through optimising behaviour of agents in perfectly competitive markets using constant returns to scale technologies. Under these assumptions, prices are set to cover costs and firms earn zero pure profits, with all returns paid to primary factors. This implies that changes in output prices are determined by changes in input prices of materials and primary factors.

Project working group

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Jo Cooper, Salisbury Libraries

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